

INTERNATIONAL SWEETENER COLLOQUIUM



FEBRUARY 24-27, 2019

TURNBERRY ISLE MIAMI | AVENTURA, FLORIDA

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SCHEDULE-AT-A-GLANCE

SUNDAY, FEBRUARY 24

9:00 AM – 6:00 PM	Registration
9:30 – 11:00 AM	Sweetener Users Association Board Meeting
Noon	Golf Tournament
6:00 – 7:30 PM	Welcome Reception
9:00 – 11:30 PM	After-Hours Party

MONDAY, FEBRUARY 25

7:30 AM – Noon	Registration
8:00 – 9:00 AM	Session I – Breakfast and Keynote Address
9:15 – 10:30 AM	Session II – International Sweetener Outlook
10:30 – 10:50 AM	Networking Break
10:50 AM – Noon	Session III – The U.S. Economic Outlook
4:00 – 5:30 PM	Sugar Industry Sustainability Meeting
6:00 – 7:00 PM	Networking Reception

TUESDAY, FEBRUARY 26

8:00 AM – 5:00 PM	Registration
8:30 – 9:00 AM	Continental Breakfast
9:00 – 10:15 AM	Session IV – A Framework for Sustainability in Sugar & Insights from Other Regions
10:15 – 10:45 AM	Networking Break
10:45 – 11:45 AM	Session V – Domestic Sugar Market Outlook
Noon – 1:15 PM	Session VI – Luncheon: Midterm Election Recap and a Look Ahead to 2020
1:30 – 2:30 PM	Session VII – Trade in the Trump Era
2:30 – 3:30 PM	Session VIII – Sugar Program Administration
3:30 – 5:00 PM	Session IX – What Lies Ahead for Ingredients

WEDNESDAY, FEBRUARY 27

7:30 – 8:00 AM	Continental Breakfast
8:00 – 9:15 AM	Session X – Consumer Trends in Sweeteners
9:15 – 10:30 AM	Session XI – Federal Sugar Policy
10:30 AM	Adjournment

TO DOWNLOAD THE CONFERENCE APP, VISIT THE APP STORE AND SEARCH “**DAIRY IDFA.**”

SCHEDULE OF EVENTS

SUNDAY, FEBRUARY 24

9:00 AM – 6:00 PM REGISTRATION

9:30 – 11:00 AM SWEETENER USERS ASSOCIATION BOARD MEETING
Sabal III

NOON GOLF TOURNAMENT*
Turnberry Isle Miami Golf Course
Sponsored by



*Separate fee required

Domino Foods, Inc.

6:00 – 7:30 PM WELCOME RECEPTION
Corsair Lawn
Sponsored by



9:00 – 11:30 PM AFTER-HOURS PARTY
Bourbon Steak
Sponsored by



MONDAY, FEBRUARY 25

7:30 AM – NOON REGISTRATION

8:00 – 9:00 AM SESSION I – BREAKFAST AND KEYNOTE ADDRESS
Garden Room

As the second in command at the U.S. Department of Agriculture, Steve Censky will be the highest-ranking U.S. official to deliver our keynote address. Deputy Secretary Censky is well versed in modern food production and plays a critical role in shaping U.S. food and agriculture policy. Having served under Presidents Ronald Reagan and George H.W. Bush at USDA, he has leadership experience and expertise in resolving complex trade matters affecting agricultural and food interests. We look forward to a robust discussion on his role at the department and the administration's views on agricultural programs and policies, especially in the U.S. sweetener sector.

Speaker: The Honorable Stephen Censky, Deputy Secretary, U.S. Department of Agriculture
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SCHEDULE OF EVENTS

(Continued)

9:15 – 10:30 AM SESSION II – INTERNATIONAL SWEETENER OUTLOOK

King Ballroom

The world sugar market is undergoing a transition. The record-high surplus stocks of sugar last year have been trimmed considerably by a sharp decline in exportable production in Brazil and weather woes in Europe. India is poised to displace Brazil as the world's largest sugar producer with back-to-back years of record cane-crop production. At the same time, world raw-sugar prices continue to climb back from a 10-year low set in August. What will happen next? Our panel will assess the current world situation and provide ideas and insight into the future direction of the market.

Moderator: Ronald Lord, *Director, Import Policies & Export Reporting Division, Foreign Agricultural Service, U.S. Department of Agriculture*

Panelists: **Ben Fessler**, *Market Analyst, International Trade & Development, C. Czarnikow Sugar, Inc.*
Robert Huff, *Miami Regional Manager, Alvean*
Leticia Phillips, *North American Representative, Brazilian Sugarcane Industry Association*

10:30 – 10:50 AM NETWORKING BREAK

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**NATIONAL
SUGAR**
MARKETING

10:50 AM – NOON SESSION III – THE U.S. ECONOMIC OUTLOOK

King Ballroom

Some 10 years after the financial crisis plunged world economies into the Great Recession, the U.S. macroeconomy has regained much of its strength and resilience, with unemployment low and recent growth strong. However, the path forward is unclear, as trade policy and government shutdowns contribute to volatile markets and some but not all analysts see a recession possible in the not-too-distant future. The agricultural economy has seen pockets of persistent weakness, affecting not only some farmers but their suppliers, lenders and others as well, and has suffered collateral damage from ongoing trade disputes. Two financial experts will provide an overview of U.S. macroeconomic prospects and offer a forecast for the U.S. agricultural sector.

Moderator: Randy Green, *Principal, Watson Green LLC*

Panelists: **Kanlaya Barr**, *Senior Economist for the Americas, Deere & Company*
Christian Lawrence, *Senior Market Strategist, Rabobank*

4:00 – 5:30 PM **SUGAR INDUSTRY
SUSTAINABILITY MEETING**
Sabal III

6:00 – 7:00 PM **NETWORKING RECEPTION**
Magnolia Courtyard
Sponsored by



TUESDAY, FEBRUARY 26

8:00 AM – 5:00 PM **REGISTRATION**

8:30 – 9:00 AM **CONTINENTAL BREAKFAST**

9:00 – 10:15 AM **SESSION IV – A FRAMEWORK
FOR SUSTAINABILITY IN
SUGAR & INSIGHTS FROM
OTHER REGIONS**
King Ballroom

Numerous industry-wide discussions over recent years led stakeholders to develop a pre-competitive framework for on-farm sustainability for sugar grown in the United States. What steps are necessary now to advance the framework and further boost sugar sustainability efforts in the United States? Our panel of experts will examine approaches underway in other regions of the world, including the efforts of the Australian and Central American sugarcane and European Union sugar beets. Experiences in other countries will help guide efforts on sugar sustainability in our domestic market. This session will cover the full range of supply-chain sustainability issues faced by end users, refiners, mills and growers, and offer insights on how best to address these challenges.

Moderator: Kevin Ogorzalek, *Manager of Sustainability Sourcing – Americas, Barry Callebaut*

Panelists: **Dr. Claudia Asensio**, *Sustainability & New Products Manager, Pantaleon Group*
Dan Galligan, *Chief Executive Officer, Australian Canegrowers*
Pat Laubacher, *Vice President of Agriculture, The Amalgamated Sugar Company LLC, Representative for National Sugar Marketing LLC*

10:15 – 10:45 AM **NETWORKING BREAK**
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SCHEDULE OF EVENTS

(Continued)

10:45 – 11:45 AM SESSION V – DOMESTIC SUGAR MARKET OUTLOOK

King Ballroom

U.S. beet growers continue to produce at a record pace, while the suspension agreements between the United States and Mexico appear to be filling the void in the raw cane market. With sugar supplies controlled by the U.S. sugar program, what factors will dictate domestic sugar prices going forward? Are product reformulations and the ongoing barrage of negative messages about sugar consumption affecting its use? Where do corn sweeteners and their declining demand fit into the picture? Our speakers will dissect the domestic sweetener market to provide direction for the road ahead.

Moderator: **Ron Sterk**, *Senior Editor, Markets, Sosland Publishing*

Panelists: **Frank Jenkins**, *President, JSG Commodities*
Craig Ruffolo, *Vice President – Commodity Specialist, McKeaney-Flavell Company*

NOON – 1:15 PM SESSION VI – LUNCHEON: MIDTERM ELECTION RECAP AND A LOOK AHEAD TO 2020

Garden Room

David Wasserman is one of the nation's top election forecasters. In 2016, he demonstrated his prescience with his piece, "How Trump Could Win the White House While Losing the Popular Vote," written two months before Election Day. More than two years later, Wasserman will take us on a tour of the key races and issues that drove the midterm results and tell us what to expect in 2020 as we look to the next presidential election. Drawing on his extensive research into cultural, demographic and voting patterns, Wasserman will assess how we arrived at this critical moment in politics and where we are headed.

Speaker: **David Wasserman**, *House Editor, The Cook Political Report*

1:30 – 2:30 PM SESSION VII – TRADE IN THE TRUMP ERA

King Ballroom

Trade is at the forefront of the Trump administration's agenda. From renegotiating trade agreements to implementing controversial enforcement measures, the United States is taking actions and enforcing policies that continue to have profound impacts on farmers and firms across the United States and around the world. This panel of trade experts will delve into the politics and long-term impact of these policy decisions.

Moderator: **Ambassador Rufus Yerxa**, *President, National Foreign Trade Council*

Panelists: **Tomas Baert**, *Counselor, Delegation of the European Union to the United States*
Don Phillips, *Trade Advisor, American Sugar Alliance*
Ambassador Darci Vetter, *Vice Chair, Agriculture, Food & Trade, Edelman*

2:30 – 3:30 PM **SESSION VIII – SUGAR PROGRAM ADMINISTRATION**
King Ballroom

The U.S. sugar program interacts with the U.S.-Mexico suspension agreements to influence supply and demand for sugar. How well is this unusual policy mix working? Is it stable and sustainable? The panel will discuss U.S. Department of Agriculture and Commerce Department actions and take a look ahead.

Moderator: **Randy Green**, *Principal, Watson Green LLC*

Panelists: **Barb Fecso**, *Director, Dairy & Sweetener Analysis Group, Farm Service Agency, U.S. Department of Agriculture*
Pat Henneberry, *Senior Vice President, Commodities Management, Imperial Sugar Company*

3:30 – 5:00 PM **SESSION IX – WHAT LIES AHEAD FOR INGREDIENTS**
King Ballroom

Trade wars. The new USMCA. Record or near-record crops. 2018 was quite a year for many ingredient markets, and the dairy industry especially was affected by trade actions. With trade headwinds still blowing, what lies ahead for cocoa powder and butter prices and demand for chocolate? Will basic commodities like corn, wheat and soybeans weather similar effects? Our speakers will discuss the present supply-and-demand picture for key ingredients used by many industrial sugar users and food manufacturers and outline possibilities for the future.

Moderator: **Ron Sterk**, *Senior Editor, Markets, Sosland Publishing*

Panelists: **Matt Gould**, *Editor & Analyst, The Dairy & Food Market Analyst*
Stephen Nicholson, *Senior Analyst, Rabo Agrifinance*
Jeffrey Rasinski, *Commodity Procurement & Risk Management, Blommer Chocolate Company*

SCHEDULE OF EVENTS

(Continued)

WEDNESDAY, FEBRUARY 27

7:30 – 8:00 AM **CONTINENTAL BREAKFAST**

8:00 – 9:15 AM **SESSION X – CONSUMER TRENDS
IN SWEETENERS**

King Ballroom

Consumers are paying more attention to what's in their food, especially sugar and other sweeteners, and they'll have easy access to the details in 2020 when Nutrition Facts labels begin to highlight added sugars in foods and beverages. Will they change their eating habits and purchasing decisions to reduce sugar intake? Not necessarily, says our panel of consumer experts. Although today's consumers are focused on health and wellness, taste still trumps all when they consider what to buy. This session will show how public policies and consumer trends could converge over the next few years to influence the demand for sugar and other sweeteners.

Moderator: **Paul Steed**, *Senior Global Price Risk Lead, Mars Wrigley Confectionery U.S.*

Speakers: **Richard Black**, *Principal, Quadrant D Consulting*

Lynn Dornblaser, *Director, Innovation & Insight, Mintel International Group*

9:15 – 10:30 AM **SESSION XI – FEDERAL SUGAR
POLICY**

King Ballroom

U.S. sugar policy remains the largest factor shaping the domestic sugar market. Whether adhering to the federal sugar program or the U.S.-Mexico suspension agreements, sugar buyers are faced with market-bending quantity restrictions and government-established price floors that limit options and oftentimes dictate actions. The panel will review the market situation today and discuss the likelihood of any changes to U.S. sugar policy in the future.

Moderator: **Liz Clark**, *Senior Vice President, Public Policy, National Confectioners Association*

Panelists: **Paul Farmer**, *President, CSC Sugar LLC*

Bill O'Conner, *Agriculture Policy Expert, Watkinson Miller PLLC*

Jack Roney, *Director, Economics & Policy Analysis, American Sugar Alliance*

10:30 AM **ADJOURNMENT**

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TURNBERRY ISLE RESORT MAP



- | | | | |
|----|-------------------------------|----|------------------------|
| 1 | FRONT DESK | 12 | WATER SLIDES |
| 2 | TURNBERRY NEWS | 13 | SURF HOUSE BAR & GRILL |
| 3 | PRO SHOP | 14 | FREESTYLE |
| 4 | SOFF'S | 15 | OASIS POOL |
| 5 | BOURBON STEAK MIAMI | 16 | LAZY RIVER |
| 6 | STARBUCKS | 17 | LAGUNA POOL |
| 7 | ÂME SPA & WELLNESS COLLECTIVE | 18 | TIDAL COVE |
| 8 | FITNESS CENTER | 19 | KIDS COVE |
| 9 | SALON | 20 | MILLER COURSE |
| 10 | TENNIS COURTS | 21 | STARTER BOOTH |
| 11 | FLOWRIDER® | 22 | SOFFER COURSE |
| | | 23 | JASMINE |



- 24 ORCHID
- 25 CORSAIR KITCHEN & BAR
- 26 HIBICUS
- 27 CASCATA POOL
- 28 BANYAN TREE
- 29 MAGNOLIA
- 30 MAGNOLIA COURTYARD
- 31 CONFERENCE CENTER NORTH
 - VERANDA 1 - 2
 - GARDEN ROOMS 1 - 2
 - KING BALLROOMS 1 - 3
 - SABAL 1 - 7

- 32 CONFERENCE CENTER SOUTH
 - ROYAL BALLROOMS 1 - 4
 - MAJESTIC BALLROOMS 1 - 8
- 33 CONFERENCE CENTER SOUTH LEVEL 2
 - PALMETTO 1 - 11
 - PALMETTO TERRACE
 - KEYS BOARDROOM
 - KEYS TERRACE

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FEBRUARY 23 – 26, 2020

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LA QUINTA, CALIFORNIA
THE GREATER PALM SPRINGS AREA

INTERNATIONAL
SWEETENER
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The International Sweetener Colloquium is jointly organized by the International Dairy Foods Association and the Sweetener Users Association



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